

This **PWS / SOW DEVELOPMENT CHECKLIST** originates from the on-line PBSA course developed through a partnership between the Institute for Supply Management (ISM), the National Contract Management Association (NCMA), and the Department of Defense. The copyrights are held by the ISM and NCMA. Copyright permission has been granted for use in USACCE's Center of Excellence for Service Contracting.

PWS / SOW Development Checklist

DIRECTIONS: Complete this checklist each time you develop a PWS / SOW

		Yes	No	Remarks
<i>Scope</i>				
1.	Will the reader understand the magnitude of the requirement and have a basic understanding of the requirement?	<input type="checkbox"/>	<input type="checkbox"/>	
2.	Is the scope consistent with the tasks or activities specified and with the end result to be obtained?	<input type="checkbox"/>	<input type="checkbox"/>	
3.	Does this section emphasize the most important aspects (that is, an overview) of the technical requirements, rather than minor details?	<input type="checkbox"/>	<input type="checkbox"/>	
4.	Have all directions to the Contractor to perform tasks been Eliminated from this section?	<input type="checkbox"/>	<input type="checkbox"/>	
<i>Specific Tasks</i>				
5.	Are the contractor's responsibilities readily distinguishable from the scope sections?	<input type="checkbox"/>	<input type="checkbox"/>	
6.	Does the PWS identify only necessary requirements? That is, are the "nice to have" eliminated?	<input type="checkbox"/>	<input type="checkbox"/>	
7.	Is the PWS specific enough to permit you, the writer, to estimate the probable cost and for the offeror to determine the levels of expertise, human resources and other resources needed to accomplish the tasks?	<input type="checkbox"/>	<input type="checkbox"/>	

		<i>Yes</i>	<i>No</i>	<i>Remarks</i>
8.	Are the contractor responsibilities stated in such a way that it knows what is requires and the organization can tell whether the contractor has complied?	<input type="checkbox"/>	<input type="checkbox"/>	
9.	Are sentences written so that there is no question of whether the contractor is obligated to perform specific tasks? (For example, “the contractor shall do this work”, not “this work shall be required” – active vs. passive)	<input type="checkbox"/>	<input type="checkbox"/>	
10.	Are tasks (that is, major tasks and subtasks) in the PWS presented in chronological order or some other logical order?	<input type="checkbox"/>	<input type="checkbox"/>	
11.	Have all proposal preparation instructions and evaluation criteria been deleted?	<input type="checkbox"/>	<input type="checkbox"/>	
12.	Does the PWS establish a delivery schedule? (Please note that the PWS should not establish a delivery schedule but may include, for clarity, significant milestones. The contract will establish a delivery schedule or period of performance.)	<input type="checkbox"/>	<input type="checkbox"/>	
13.	If elapsed time is used, does it specify calendar days or workdays?	<input type="checkbox"/>	<input type="checkbox"/>	

		<i>Yes</i>	<i>No</i>	<i>Remarks</i>
14.	Does the PWS require the contractor to get permission from or provide something to someone other than the contracting officer or the COR? If so, have specific authorizations and instructions been provided to avoid contractual problems?	<input type="checkbox"/>	<input type="checkbox"/>	
15.	Can the technical representative who is asked to sign the acceptance report determine whether the contractor has complied with the requirements?	<input type="checkbox"/>	<input type="checkbox"/>	
16.	Is the requirement completely described? (To be legal and binding, an agreement must be complete, not only for reasons of legality, but for every practical application. Specify “when” and “where” as well as “what”.)	<input type="checkbox"/>	<input type="checkbox"/>	
17.	Have “catch-all” statements (which generally result in either an expensive disagreement or in a windfall to the contractor) been eliminated?	<input type="checkbox"/>	<input type="checkbox"/>	
18.	Is the requirement over-specified? (The ideal situation is to specify the results required and let the winning contractor find the best method of attainment.)	<input type="checkbox"/>	<input type="checkbox"/>	
19.	Has the work been organized into tasks? (This is helpful in evaluation, and it may be used for control during performance.)	<input type="checkbox"/>	<input type="checkbox"/>	

		<i>Yes</i>	<i>No</i>	<i>Remarks</i>
<i>Technical Exhibits</i>				
20.	Is the applicable document properly cited?	<input type="checkbox"/>	<input type="checkbox"/>	
21.	If only portions of the document apply, have you clearly stated which portions apply?	<input type="checkbox"/>	<input type="checkbox"/>	
22.	Is the document really pertinent to the task?	<input type="checkbox"/>	<input type="checkbox"/>	
23.	Do any standard specifications or paragraphs apply in whole or in part? If so, are they properly cited?	<input type="checkbox"/>	<input type="checkbox"/>	
<i>General</i>				
24.	Is the PWS written using the format recommended? If not, provide your rationale in the Remarks section.	<input type="checkbox"/>	<input type="checkbox"/>	
25.	Has extraneous information been eliminated? (Ask the following questions: Does it tell what the contractor is responsible for? Is it necessary in order for the organization to obtain the required results?)	<input type="checkbox"/>	<input type="checkbox"/>	
26.	If this PWS is for commercial services, have requirements been adequately identified so that they may be acquired on a basis other than cost-reimbursement?	<input type="checkbox"/>	<input type="checkbox"/>	
27.	Does the PWS bias the effort in favor of a sole source? (The PWS specifies a government requirement and is supposedly impartial concerning who can do it. In keeping with this philosophy, the PWS should not reference source or proprietary talent.)	<input type="checkbox"/>	<input type="checkbox"/>	

		<i>Yes</i>	<i>No</i>	<i>Remarks</i>
28.	Do the PWS requirements create an organizational conflict of interest? a. Will the contractor (that is, an offeror) be placed in a position where it cannot provide impartial advice and assistance? For example, does the PWS require the contractor to review its own work? b. Will the contractor (that is, an offeror) receive an unfair competitive advantage on this acquisition or future acquisitions based on its performance under past or present acquisitions? For example have you drafted requirements whereby the contractor will prepare a PWS that will subsequently be competitively procured?	<input type="checkbox"/>	<input type="checkbox"/>	
29.	Is more than one interpretation (throughout the PWS) impossible?	<input type="checkbox"/>	<input type="checkbox"/>	
30.	Has the PWS been checked for grammatical usage?	<input type="checkbox"/>	<input type="checkbox"/>	
31.	Has the PWS been spell-checked?	<input type="checkbox"/>	<input type="checkbox"/>	
32.	Have headings been checked for format and grammatical usage? Are subheadings comparable? Is the text compatible with the title? Is a multidecimal numbering system used?	<input type="checkbox"/>	<input type="checkbox"/>	

Note: If government-furnished property will be provided, the nomenclature, quantity, estimated value, serial number (if appropriate), location and date of delivery to the contractor should be stated in the information for the contracting officer that is submitted with you purchase request package.